Interoperability Center - Administrator's Guide

AWARDS Instruction Sheet

Overview

Regional Health Information Organizations (RHIOs) allow for the sharing of client data from a program with any other providers that are a part of the same network. That data can then be accessed via the RHIO portal. AWARDS makes available to agencies an optional set of functionality that enables them to work directly with the RHIOs that they belong to, automatically transmitting client data to the portal upon the completion of common data entry tasks such as intake/admission, merge, transfer, discharge, demographics information update, and consent form completion.

While the bulk of the data transmission work to the RHIO portals happens behind-the-scenes and without user intervention after initial configuration is completed by Foothold Staff, AWARDS also provides access to an Interoperability Center - a central point from which administrative users can manually complete the same transmission functions between your agency's programs and the RHIOs to which they belong. Within the Interoperability Center, located in the System Setup module, users also have access to review and oversight tools not available elsewhere.

★ ***Important!*** *Various individuals within an agency may work with Interoperability functionality. For documentation purposes we've grouped these individuals into two categories - "Administrators" who have access to the full Interoperability Center in the System Setup module, and "Line Staff" who do not have access to the Interoperability Center and who will instead be limited to interfacing with a single Interoperability component - RHIO-related consents information - integrated into the daily workflow of the Intake/Admission and Profile modules.*

*The document you are currently viewing is intended for use by Administrators, as a guide to all aspects of the Interoperability Center functionality. If you are Line Staff and do not have access to the Interoperability Center itself, please refer instead to our **Interoperability Center - RHIO Consents -** Instruction Sheet. It will guide you through the process of working with RHIO consents information elsewhere in AWARDS.*

Interoperability Center Basics

There are three main components to Interoperability functionality in AWARDS, each represented by a set of options on the Interoperability Settings page seen immediately upon entering the **Administration** component of the System Setup module's Interoperability Center feature.

RHIO Consents

After your program(s) have been configured by Foothold Technology to communicate with relevant RHIO(s), client data is automatically transmitted to the RHIOs via special messages or as part of a CCD (Continuity of Care Document) - detailed below. Whether or not a given client's data can be accessed by other facilities associated with the RHIOs is based on consent. Consent forms can be completed as part of the Intake/Admission process for new clients, and can also be accessed and maintained for existing clients from within the face sheet or using the related Interoperability Center component, noted here. Regardless of the location from which consent information is recorded, it is the consent value indicated on the form and transmitted to the RHIO that controls whether client data will be shared.

- **View/File Consent Form** - Used to view and enter consent forms for existing clients.

CCD Messages

Clinical client data transmitted to the RHIOs from AWARDS is sent via Continuity of Care Document (CCD) messages. These messages are automatically generated when various pieces of a client's records are updated by program staff - medications, vital signs, allergies, axis III diagnoses, diagnostic tests, and discharge data. The Interoperability Center allows administrators to manually transmit, view, or download these documents if necessary, as well as to cross-check the data being communicated between AWARDS and the RHIO, using the following components:

- **Generate CCD** - Used to generate a CCD for a client for viewing and/or downloading purposes. That CCD is the same document automatically created upon update of relevant portions of a client's records, and is a snapshot of the clinical data as it exists in AWARDS at the time of generation. This Interoperability component does not transmit the CCD, only generates it.

☀ ***Tip:*** *This Interoperability component can be useful in the event that it is necessary to provide a patient with an offline copy of his/her patient record.*

- **Transmit CCD** - Used to manually transmit a CCD message to the RHIO configured for a selected client. This is a manual version of what takes place automatically when updates are made to relevant portions of a client's records.
- **View/Download CCD** - Used to view or download the latest CCD transmitted to the RHIO for a selected client. Conversely, it can also be used to retrieve and view/download the latest CCD from the RHIO for that client, if applicable. The CCD retrieval process is completed using the following tool:
  - **Retrieve CCD** - Used to view a summary document from the RHIO for a selected client. That CCD will contain client information shared with the RHIO from your agency and, depending on the consent level transmitted to the RHIO for the client, may also include information contributed by other facilities.
- **Transmitted Messages** - Used to generate a report providing a full history of communication for a selected client or all clients. This report can be useful when cross-checking data that has been transmitted from AWARDS to the RHIO portal.

Legacy Client Record Keeping

When a program at your agency is set up to connect to a RHIO and use the Interoperability Center, batch registration messages are transmitted for all existing clients on the active roster of that program. Those messages register the clients in the RHIO with an encounter record for your program. Moving forward, new clients are registered via a registration message as part of the admission process. In the event that you would also like to transmit data to the RHIOs on clients who are no longer active in the program (those that are in the roster archives), you can do so manually using the legacy record keeping components:

✎ ***Note:*** *These Interoperability Center components are only relevant when working with legacy clients for the purposes of getting started, and are not features that will be used on an ongoing basis.*

- **Register Client** - Used to register a legacy (roster archive) client with the RHIO if necessary. This is the manual version of the automated transmission that takes place during the admission process.
- **Discharge Client** - Used to discharge a legacy (roster archive) client from the RHIO if that client has been separately registered using the Register Client component. This is the manual version of the automated transmission that takes place during the discharge process.

Required Permissions

In order to use the AWARDS Interoperability Center and its RHIO-related functionality, it must have been turned on and configured for your agency by Foothold Technology. If you are interested in using this functionality and it has not yet been set up for you, please review our **Interoperability Center** - Information Sheet and Service Agreement guide, and/or contact our Meaningful Use team at mu@footholdtechnology.com for assistance.

Permissions required to use the Interoperability Center in the capacity of an Administrator (once it has been turned on and configured) are as follows:

Program Chart Access
Interoperability Center

And ONE of the following permissions:

Display Executive Administration Buttons
Permissions Data Entry
Permissions Data Entry for All Staff and Layers

☀ ***Tip:*** *The **Interoperability Center** permission is assigned by Foothold Technology. Please contact the Help Desk if you need access.*

✎ ***Note:*** *Members of the "Executive Officer" and "System Administrator" user groups are exempt from all but the Interoperability Center permit.*

Access to the Interoperability Center is not required in order to work with RHIO consents information. If you will also be accessing consents information from outside of the Interoperability Center as line staff do, be sure to review the permission requirements detailed in the **Interoperability Center - RHIO Consents -** Instruction Sheet.

About This Document

This document is intended to guide you through the process of using each component of the Interoperability Center. Specific topics covered are:

Generating a CCD
Transmitting a CCD to the RHIO
Viewing / Downloading a Transmitted CCD
Viewing / Filing a Consent Form
Registering a Legacy Client with the RHIO
Discharging a Legacy Client from the RHIO
Viewing a Transmitted Messages Report

Generating a CCD

The Interoperability Center's Generate CCD component allows administrators to manually complete the CCD generation that occurs automatically when various pieces of a client's records are updated by program staff - medications, vital signs, allergies, axis III diagnoses, diagnostic tests, and discharge data - and to then view and/or download that CCD.

To manually generate a CCD, complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.

2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.

3. Click the **Program** drop-down arrow and select the program of the client for whom the CCD is to be generated. (If the client is no longer on the active roster, click the **Roster Archives** checkbox as well.)

> ☀ *Tip: The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

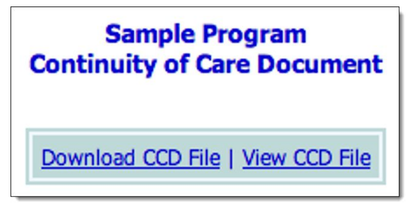
4. Click the **Actions** drop-down arrow and select "Generate CCD."

5. Click **CONTINUE**. The *Generate CCD* page is displayed.

6. Click the **Client** drop-down arrow and select the client for whom the CCD is to be generated.

7. Click **CONTINUE**. The *Continuity of Care Document* page is displayed.

8. At this time you can choose to download or view the CCD file as needed, using the links available on this page.



> ☀ *Tip: Downloaded CCD files are in XML format. To look at the CCD in a readable format, choose to view rather than download.*

The process of manually generating a CCD is now complete.

Transmitting a CCD to the RHIO

The Interoperability Center's Transmit CCD component allows administrators to manually complete the CCD transmission that occurs automatically when various pieces of a client's records are updated by program staff - medications, vital signs, allergies, axis III diagnoses, diagnostic tests, and discharge data.

To manually transmit a CCD, complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.

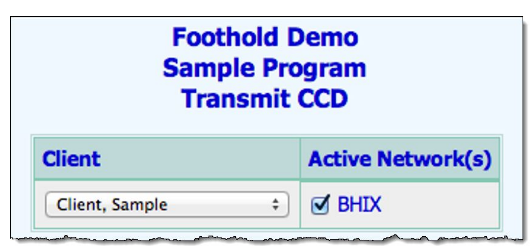
2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.

3. Click the **Program** drop-down arrow and select the program of the client for whom the CCD is to be generated. (If the client is no longer on the active roster, click the **Roster Archives** checkbox as well.)

> ☀ *Tip: The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

4. Click the **Actions** drop-down arrow and select "Transmit CCD."

5. Click **CONTINUE**. The *Transmit CCD* page is displayed.



6. Click the **Client** drop-down arrow and select the client for whom the CCD is to be transmitted.

7. Click the **Active Network** check box next to each RHIO (if more than one) that the CCD is to be transmitted to.

8. Click **CONTINUE**. The CCD is transmitted to the selected RHIO(s) and a confirmation page is displayed.

The process of manually transmitting a CCD is now complete.

☀ ***Tip:*** *To later access the CCD you have transmitted, use either the View/Download CCD or View Transmitted Messages components of the Interoperability Center, both detailed in this instruction document.*

Viewing / Downloading a Transmitted CCD

The Interoperability Center's View/Download CCD component allows administrators to manually access, view, and download the CCDs that were automatically generated and transmitted by AWARDS to the RHIO when specific components of a client's records were updated by program staff; specifically, medications, vital signs, allergies, axis III diagnoses, diagnostic tests, or discharge data. This Interoperability component can also be used to request and retrieve an updated CCD from the RHIO for a client. In the event that the client has been served elsewhere and has granted consent to your agency to access all of his/her data, the document retrieved from the RHIO will be an aggregated CCD – a comprehensive CCD inclusive of any other facilities.

To view/download an AWARDS-generated CCD and/or to retrieve an aggregated CCD from the RHIO itself, please complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.

2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.

3. Click the **Program** drop-down arrow and select the program of the client for whom the CCD is to be viewed/downloaded and/or retrieved. (If the client is no longer on the active roster, click the **Roster Archives** checkbox as well.)

   ☀ ***Tip:*** *The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

4. Click the **Actions** drop-down arrow and select "View/Download CCD."

5. Click **CONTINUE**. The *View/Download CCD* page is displayed.

6. Click the **Client** drop-down arrow and select the client whose CCD is to be viewed/downloaded and/or retrieved.

7. Click **CONTINUE**. The *View/Download CCD* information page is displayed.

   This page contains a list of recent inbound and outbound CCD communication for the selected client with the RHIO(s) configured for the program in question. It also includes an **Excel File** link that can be used to work with a copy of the communication data table in Microsoft Excel, as well as **View** and Download links for working with any of the specific CCDs listed here.

   ✎ ***Note:*** *The CCD list (shown at right) includes the most recent outbound CCD for each RHIO, as well as the most recent inbound CCD if one has been manually retrieved for the client from the RHIO using the Retrieve CCD tool.*

   At this time, use the tools found on this page until you've completed all necessary actions.

☀ ***Tip:*** *When using the* ***View*** *and* ***Download*** *links on this page please keep in mind that downloaded CCD files are in XML format. To look at the CCD in a readable format, choose to view rather than download.*

If you'd also like to retrieve the client's CCD from the RHIO, continue with step **8**. Otherwise, the process of viewing / downloading a CCD is now complete.

8. Click **Retrieve CCD**. The *Retrieve CCD* page is displayed for the client you are working with.

9. Click the **Active Network(s)** checkbox for each associated RHIO (if more than one) from which you would like to retrieve the client's CCD.

10. Click **CONTINUE**. A confirmation message is displayed letting you know that your request is being processed. Once the processing is complete, the page will be updated to reflect that. You can then continue with step **11**.

✎ ***Note:*** *In order to retrieve CCDs from a RHIO, you must be authorized to do so by that RHIO. If you have not been authorized you will be notified by AWARDS at this time.*

11. At this time you can use the available **View** and **Download** links on the page to access the retrieved CCD.

☀ ***Tip:*** *When using the* ***View*** *and* ***Download*** *links on this page please keep in mind that downloaded CCD files are in XML format. To look at the CCD in a readable format, choose to view rather than download.*

CCDs retrieved from a RHIO are also transmitted to you via your AWARDS Messages module. To access and open the CCD you just retrieved from within the Messages module instead, click **Messages** from the navigation bar. The AWARDS Messages module is displayed with your inbox shown by default.

12. Within your inbox locate and click the Network CCD Retrieval internal audit message to open it, and from there access the CCD info.

The process of retrieving a CCD is now complete.

☀ ***Tip:*** *To later access the CCD you have retrieved, re-open the retrieval message you received, or use either the View/Download CCD or View Transmitted Messages components of the Interoperability Center, both detailed in this instruction document.*

Viewing / Filing a Consent Form

When a program is part of a RHIO network, the admission process for new clients into that program (completed from within the Intake/Admission module in AWARDS) automatically includes entry of the consent form for that RHIO (likewise with the intake process if the program uses multi-step intake). After admission, consent forms can be accessed from the following AWARDS locations:

- **The Intake/Admission module > client's completed Intake/Admission Form**
- **The Profile module > client's Face Sheet**
- **The System Setup module > Interoperability Center > Administration > View/FIle Consent**

The first and second points of access are available for use by anyone (administrators or line staff) with the appropriate permissions. They are detailed in the **Interoperability Center - RHIO Consents -** Instruction Sheet, along with step-by-step instructions for entry of consent forms for new clients during the intake/admission process, and detailed information on how to review consent status information on an individual or multi-customer basis.

☀ *Tip: AWARDS accepts consents for minors from parents or guardians and zeroes them out at the client's 18th birthday. After the consumer's 18th birthday a consent from the (now) adult client can be collected. This feature is on by default for all health information exchanges (HIE), but your HIE may not accept certain consents or ask Foothold Technology to turn the feature off based on their specific policies.*

To work with the consent information for an existing client from the third point of access – within the Interoperabilty Center itself using the View/File Consent feature - complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.

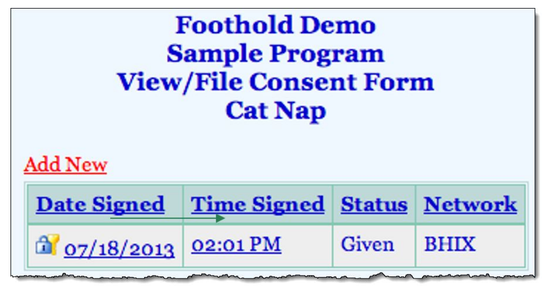
2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.

3. Click the **Program** drop-down arrow and select the program of the client for whom consent records are to be worked with. (If the client is no longer on the active roster, click the **Roster Archives** checkbox as well.)

   ☀ *Tip: The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

4. Click the **Actions** drop-down arrow and select "View/File Consent Form."

5. Click **CONTINUE**. The *View/File Consent Form* page is displayed, listing any existing consent activity for the selected client, as well as the option to add a new consent form.



6. At this time, complete any of the following consent activities as needed:

   - **Open an existing consent** - Click the link for the consent to be viewed. The consent is displayed and can be printed, or the client or his/her legal representative can sign it if only one of the two signed it initially but both must do so.

   - **Add a new consent** - OR - **Withdraw a previous granted consent** - Continue with step **7**.

7. Click **Add New**.

   If there were no existing consent records for the client or the consent was most recently withdrawn, the consent form is automatically displayed and the consent choices are granted or denied. Skip ahead to step **9**.

   If there were existing consent records for the client, the *Add New* dialog box is displayed. Continue with step **8**.

8. From this dialog box, click one of the following options:

   - **Consent** - Click this button to complete a consent form for the client that grants or denies consent. The *Consent Form* is displayed.

   - **Withdrawal** - Click this button to complete a withdrawal of consent form for the client that withdraws a previously granted consent. The *Withdrawal of Consent Form* is displayed.

     ✎ ***Note:*** *The option is not available for all RHIOs.*

9. Fill out the data entry fields/options on the form. The available options are based on the type of consent form you have chosen to enter.

    - **Patient or Legal Representative was given a copy of this form in** - Select the appropriate language.
    - **Consent Terms** - Click the appropriate radio button to indicate whether the client GIVES or DENIES consent.

    ✎ ***Note:*** *Only available when "Consent" was selected in step **8**. Not applicable for withdrawal of consent forms.*

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10. Click **CONTINUE** at the bottom of the page. The *Electronic Signatures* dialog box is displayed.
11. Click the **Patient** or **Patient's Legal Representative** radio button to indicate who will be signing this consent form.
12. Click **CONTINUE**. The *Electronic Signatures Client Signing* dialog box is displayed.
13. Click the appropriate **Sign by** radio button to indicate how the client or his/her legal representative will sign.

    ✎ ***Note:*** *The PIN option is only available when "Patient" was selected in step **11**. Other options are based on electronic signatures configuration in your database. For more information on the signing types and electronic signature configuration and signing processes in general, refer to AWARDS Online Help.*

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14. Click **OK**, and then complete the corresponding signing process:

    - **Signing by PIN** - Forms can be signed using initials or full name images. Click the **Sign With** radio button next to the type of image with which the client is to sign this form.

        ★ ***Important!*** *If the client does not have a PIN (which will always be the case for any new client not currently enrolled in another AWARDS program), and you do not have the ability to assist him/her in setting one up, he/she will be prevented from signing the consent form using this method. If you DO have the ability to assist the client in setting up a PIN, click the **Click here to Assign a PIN** link displayed at this time and complete the configuration process.*

        In the **PIN** field, direct the client to type his/her five-digit PIN to confirm his/her identity. To exit without signing the form, click **Cancel**.

    - **Signing by Signature Pad** - Direct the client or legal representative to use the signature pad to enter his/her signature. Click **Draw** to give focus to the signing area before the client/representative signs on the pad, **Clear** if you'd like to clear what has been entered using the pad, or **Cancel** to exit without signing the consent.
    - **Signing by Touch** - Direct the client or legal representative to use his/her finger or a stylus to enter his/her signature directly on the screen when using a tablet, touchpad, or other touch-enabled device, or to use the mouse to sign on the screen if the device is not directly touch-capable. Click **Clear** if you'd like to clear what has been entered, or **Cancel** to exit without signing the form.

    On the e-signing interface the client or other individual may also be asked to select authority level information, and in the case of legal representatives, to enter his/her name and title on the page. Be sure to complete those data entry steps in addition to the actual signing described above.

    Once the appropriate signing method has been used, including any corresponding data entry, continue with step **15** to complete the signing process.

15. Have the client or legal representative click **SIGN NOW**.

★ ***Important!*** *Clicking the SIGN NOW button is an acknowledgment that the individual doing so is the authorized signer. An electronic signature constitutes a legally binding symbol that authenticates the document to which it is attached.*

16. The consent form is electronically signed and locked, a message is sent to the RHIO, and the *View/File Consent Form* index page is re-displayed.

The process of viewing / filing a consent form is now complete.

Registering a Legacy Client with the RHIO

The Interoperability Center's Register Client component allows administrators to manually register legacy clients (those clients no longer on the active census) if they choose to keep a record of those clients with the RHIO. Use of this feature is optional; if a program chooses to use it, it will only be relevant for the purposes of getting started with the Interoperability Center, and will not be used on an ongoing basis. (All existing clients on the active roster will have been registered with the RHIO during configuration, and new clients will be registered upon admission.)

To manually register a legacy client with the RHIO, complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.

2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.

3. Click the **Program** drop-down arrow and select the program of the client who is to be registered with the RHIO.

☀ ***Tip:*** *The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

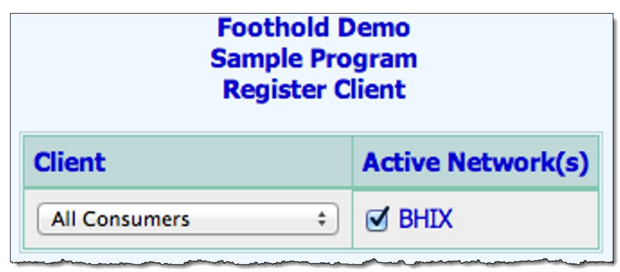
4. Click the **Actions** drop-down arrow and select "Register Client."

5. Click the **Roster Archives** checkbox.

6. Click **CONTINUE**. The *Register Client* page is displayed.

7. Click the **Client** drop-down arrow and select the client who is to be registered with the RHIO(s).

8. Click the **Active Network(s)** checkbox next to each RHIO (if more than one) that the client is to be registered with.



9. Click **CONTINUE**. A confirmation message is displayed on the page letting you know that your request is being processed. Once the processing is complete, the page will be updated to reflect that. Continue with step **10**.

10. Registration information is transmitted to you via your AWARDS Messages module. To access and open that information, begin by clicking **Messages** from the navigation bar. The AWARDS Messages module is displayed with your inbox shown by default.

11. Within your inbox locate and click the Network Client Registrations internal audit message to open it, and from there access the registration information.

The process of manually registering a client with the RHIO is now complete.

Discharging a Legacy Client from the RHIO

The Interoperability Center's Discharge Client component allows administrators to manually discharge legacy clients (those clients no longer on the active census) from the RHIO. This step is only necessary when the program has chosen to register legacy clients with the RHIO during the startup period (using the Register Client component of the Interoperability Center). It is not a feature that will be used on an ongoing basis. (Existing clients will be automatically discharged from the RHIO upon their AWARDS discharge.)

To manually discharge a legacy client from the RHIO, complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.
2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.
3. Click the **Program** drop-down arrow and select the program of the client who is to be discharged from the RHIO.

☀ ***Tip:*** *The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

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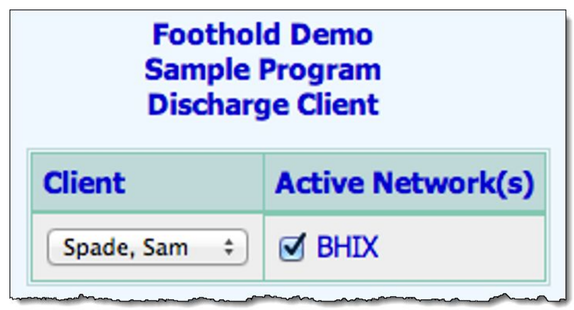
4. Click the **Actions** drop-down arrow and select "Discharge Client."
5. It is not necessary to check off the **Roster Archives** checkbox on this page; it is used by default with this feature.
6. Click **CONTINUE**. The *Discharge Client* page is displayed.



7. Click the **Client** drop-down arrow and select the client who is to be discharged from the RHIO.
8. Click the **Active Network(s)** checkbox next to each RHIO (if more than one) that the client is to be discharged from.\
9. Click **CONTINUE**. A confirmation message is displayed on the page letting you know that your request is being processed. Once the processing is complete, the page will be updated to reflect that.

The process of manually discharging a client from the RHIO is now complete.

Viewing a Transmitted Messages Report

The Interoperability Center's Transmitted Messages component allows administrators to view a history of communication with the RHIO that can be cross-checked against the RHIO portal itself to confirm that what's been sent by AWARDS has been received by the RHIO.

To view a transmitted messages report, complete the following steps from the AWARDS *Home* page:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. A fly-out menu is displayed.
2. Click **Interoperability Center**, and then **Administration**. The *Interoperability Settings* page is displayed.

3. Click the **Program** drop-down arrow and select the program of the client who is to be discharged from the RHIO.

☀ ***Tip:*** *The selected program must have been connected with a RHIO during configuration. If you are unsure which of your programs are set up for a given RHIO network, please contact the Help Desk for assistance.*

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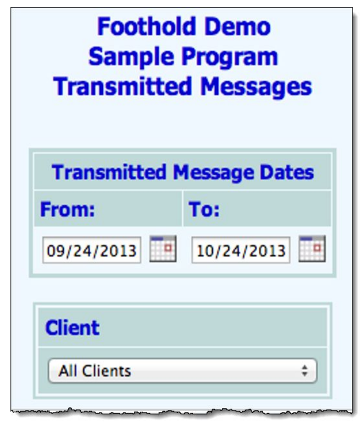
4. Click the **Actions** drop-down arrow and select "Transmitted Messages."

5. To run the transmitted messages report for discharged clients, click the **Roster Archives** checkbox.

6. Click **CONTINUE**. The *Transmitted Messages* settings page is displayed.

7. Report contents are limited to the messages transmitted at some point during the date range specified using the **Transmitted Message Dates** fields on this page.



   By default, the date range is set to the last month. If necessary, make changes to that default range using the available **From** and **To** fields/date pickers.

8. Click the **Client** drop-down arrow and select the client for whom the report is to be viewed. The default value is "All Clients."

9. Click **CONTINUE**. The report is generated and displayed on the *Transmitted Messages* page.

   The contents of this read-only report include a table with columns for client ID and name, message transmission date and time, message type, the RHIO network with which the transmission occurred, and the message direction (inbound or outbound). Listed in the table are all messages between AWARDS and those RHIO(s) associated with the program selected in step **3**. Contents are further limited to messages for the client and date range specified on the previous page.

☀ ***Tip:*** *Click any of the table's column headings to sort the contents by that variable. Clicking a heading more than once reverses the sort order. To also sort by a secondary variable, press **<SHIFT>** and click the second column heading. To limit which columns are displayed in the report table, click the column display icon in the upper left-hand corner of the report, and pick and choose which columns of information should be included.*

When reviewing the report data, please keep in mind the following:

- What you see in the transmitted messages report can be cross-checked against the RHIO portal. If you see a message listed in the AWARDS report that is NOT reflected in the RHIO portal, please contact the Help Desk for assistance.

- Individual messages can be viewed and/or downloaded by clicking the corresponding links on the right side of the message row in question. Viewing opens the message in a separate browser window for your review. Downloading saves ADT messages to your computer as .TXT files, and CCD messages as .XML files.

  ✎ ***Note:*** *The viewing option displays message content in the standardized (HL7) format that is transmitted to the RHIO and is not intended to be user-friendly.*

- Various types of messages will be represented by rows in the report table, and may include the following:

  ✎ ***Note:*** *Please keep in mind when reviewing this list that ADT messages are not specifically listed in the RHIO portal; rather, the presence of the message determines registration/encounter/consent integration in the portal.*

- **ADT_A01 - Admission** - A message transmitted to the RHIO upon the client's admission (or re-admission) to the program via the Intake/Admission module, or upon manual registration of the client using the Interoperability Center's Register Client component.
- **ADT_A03 - Discharge** - A message transmitted to the RHIO upon the client's discharge from the program via the Discharge module, or upon manual discharge information submission using the Interoperability Center's Discharge Client component. Upon receipt of this message the patient encounter in the portal is updated with an end date based on the AWARDS discharge date.
- **ADT_A04 - Registration** - A message transmitted to the RHIO upon the client's admission (or re-admission) to the program via the Intake/Admission module, or upon manual registration of the client using the Interoperability Center's Register Client component.
- **ADT_A08 - Update** - A message transmitted to the RHIO upon update or withdrawal of a client's consent, or update of his/her demographic data via the face sheet in the Profile module, or intake/admission record in the Intake/Admission module.
- **ADT_A40 - Merge** - A message transmitted to the RHIO upon merge of two or more client records into one via the Merge Duplicate Clients feature under Client Lookup. When a merge is completed the relevant client identifier is updated in the RHIO portal as well.
- **CCD** - A message transmitted to the RHIO containing a Continuity of Care Document. This message is automatically triggered upon updates to the client's medications, vital signs, allergies, axis III diagnoses, diagnostic tests, and/or discharge data, or can be manually triggered using the Interoperability Center's Transmit CCD component.

The process of viewing a transmitted messages report is now complete.

